European pear crop outlook 2017

“a quantitative and qualitative review”

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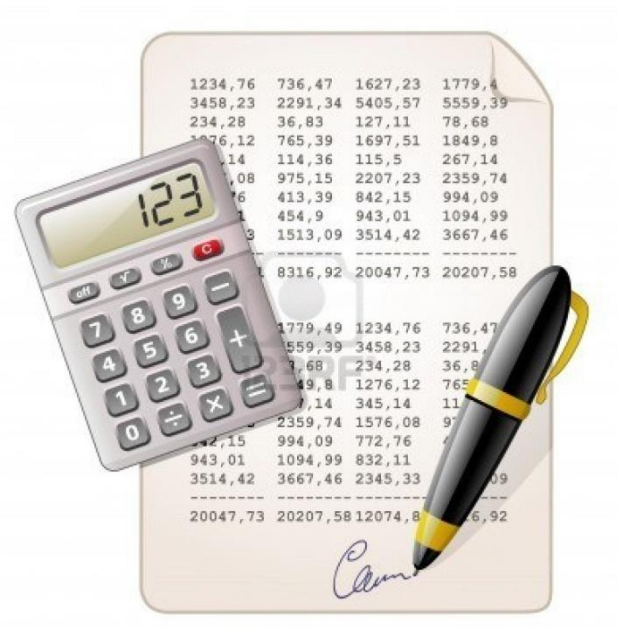
World Apple and Pear Association (WAPA)

Presentation structure

- Validation 2016 data
- NH Pear forecast 2017: quantitative approach
- NH Pear forecast 2017: qualitative approach
- Final comments

Validation 2016 data



Forecast 2016 in Hamburg

2.169.942 T + =

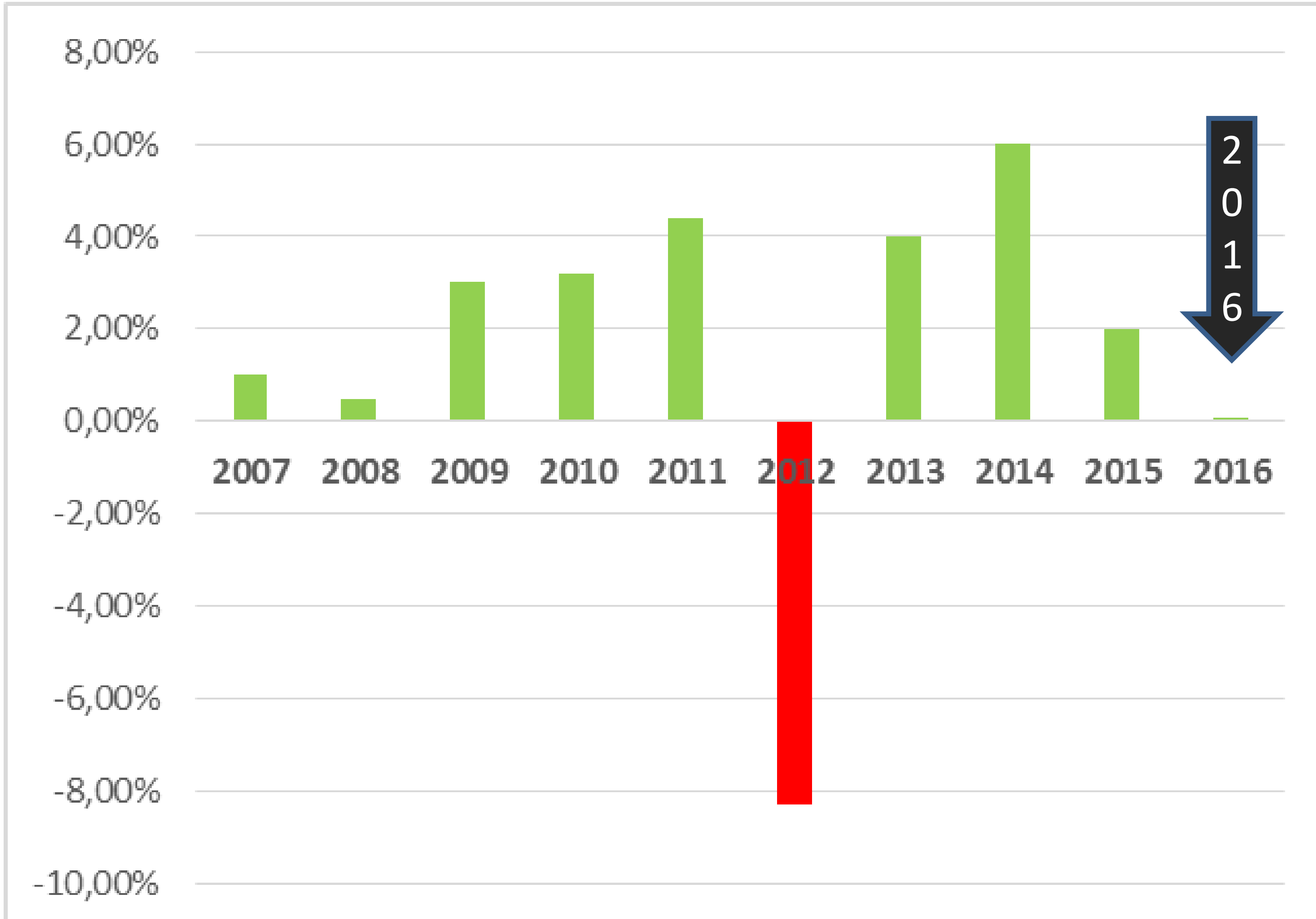
CROP FORECAST 2016 RANKING 8TH IN THE DECADE FIGURES

Forecast and actual results 2016

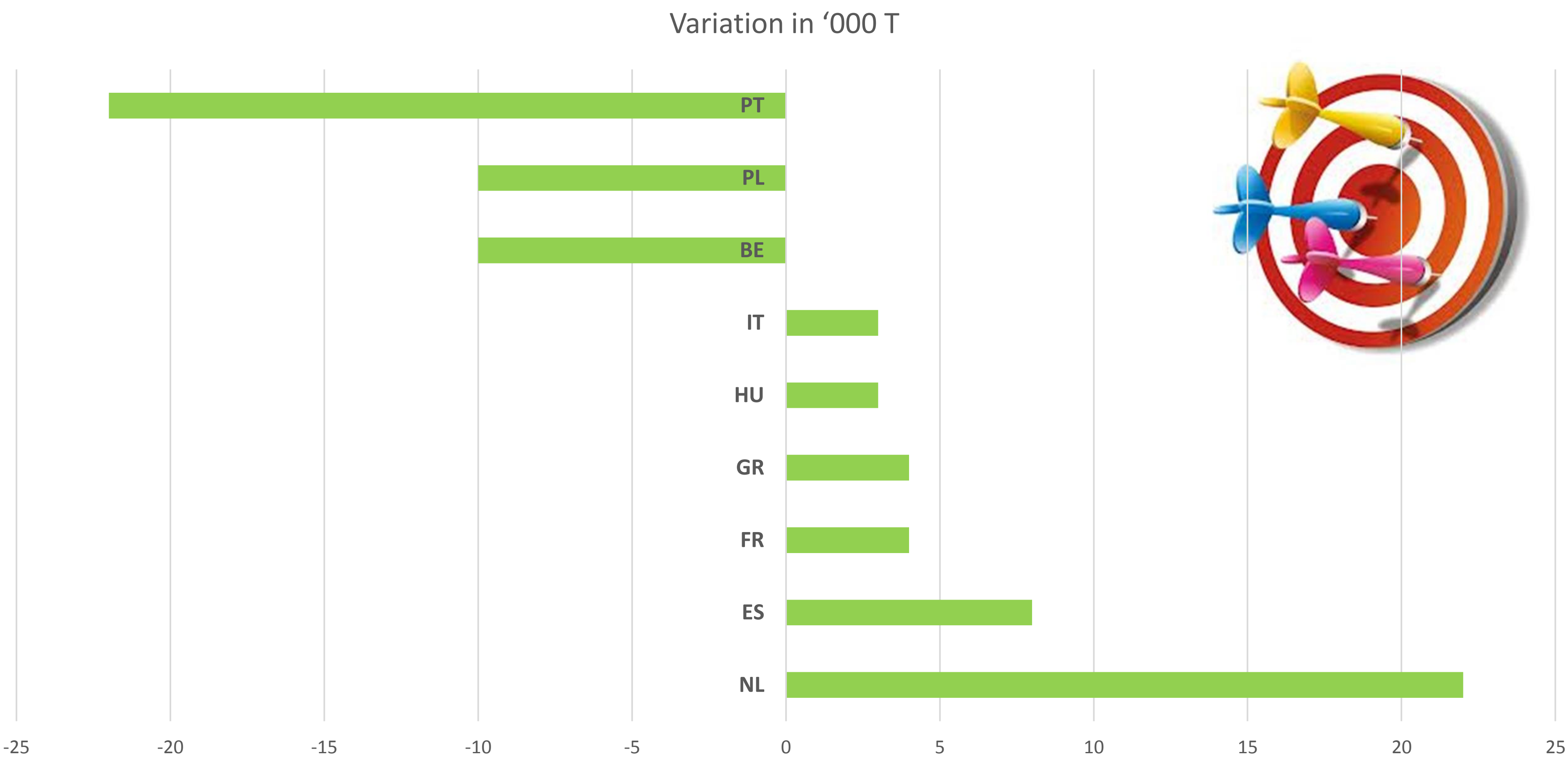
2.169.942 T + 3.120 T = 2.172.062T

+0,1%

Forecast and actual results over time



Forecast and actual results 2016



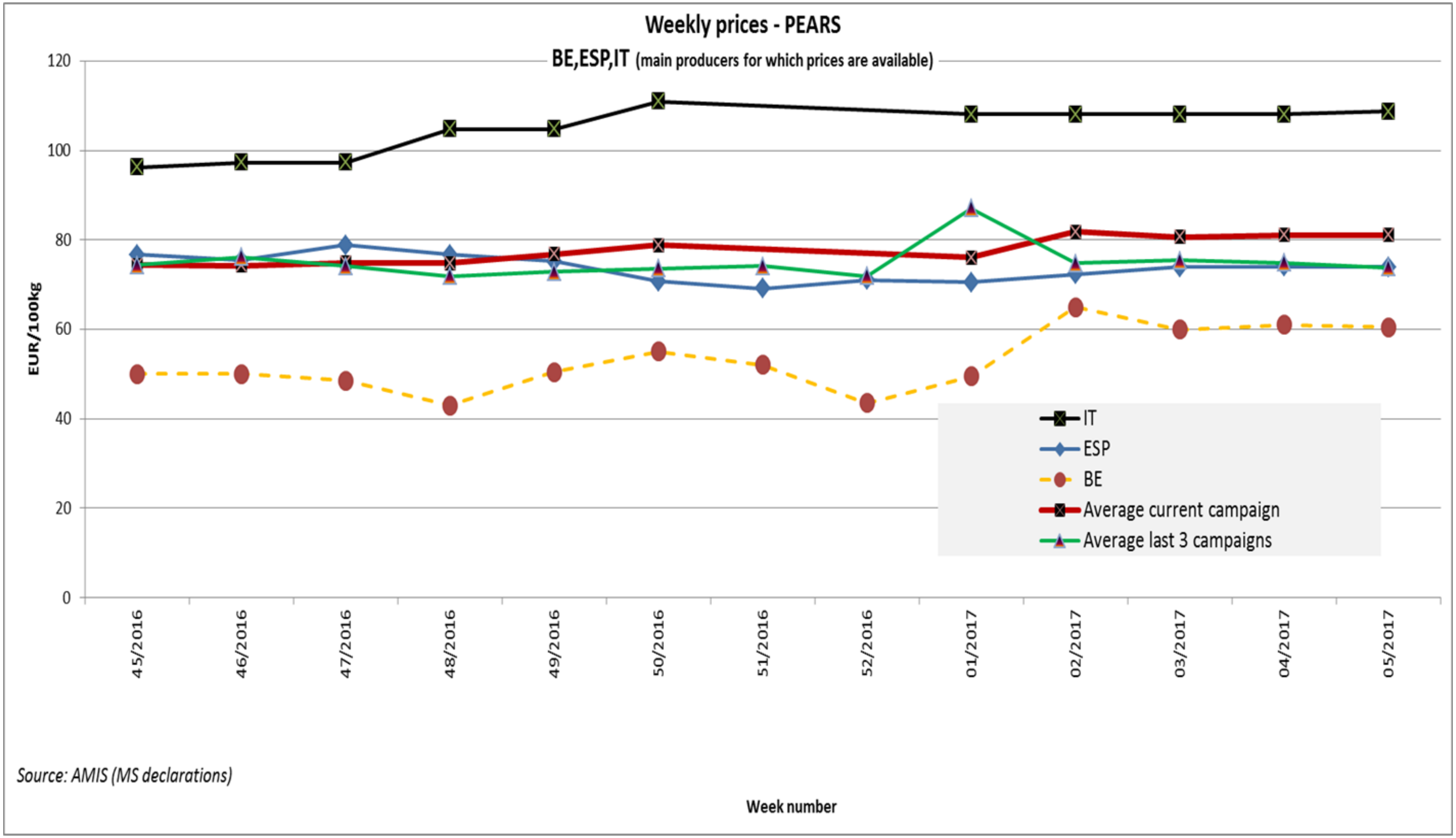
Total 3.120 T difference (0,1 % increase variation)

Forecast and actual results 2016 (per varieties)

Variation in 000 T	2016 forecast	2016 FINAL	VAR %	VAR T
Others	284	293	3%	9
Williams BC	252	261	4%	9
Abate	290	296	2%	6
Doyenne du Comice	76	81	7%	5
Blanquilla	37	40	8%	3
Coscia-Ercollini	66	67	2%	1
Guyot	58	59	2%	1
Durondeau	4	3	-25%	-1
Kaiser	39	38	-3%	-1
Passacrassana	12	11	-8%	-1
Conference	918	910	-1%	-8
Rocha	136	113	-17%	-23
TOTAL	**2.170**	**2.173**	**0%**	**3**

Market trends

XLII Prognosfruit
Lleida, 9-11 August 2017



Source: AMIS (MS declarations)

Pears stock depletion

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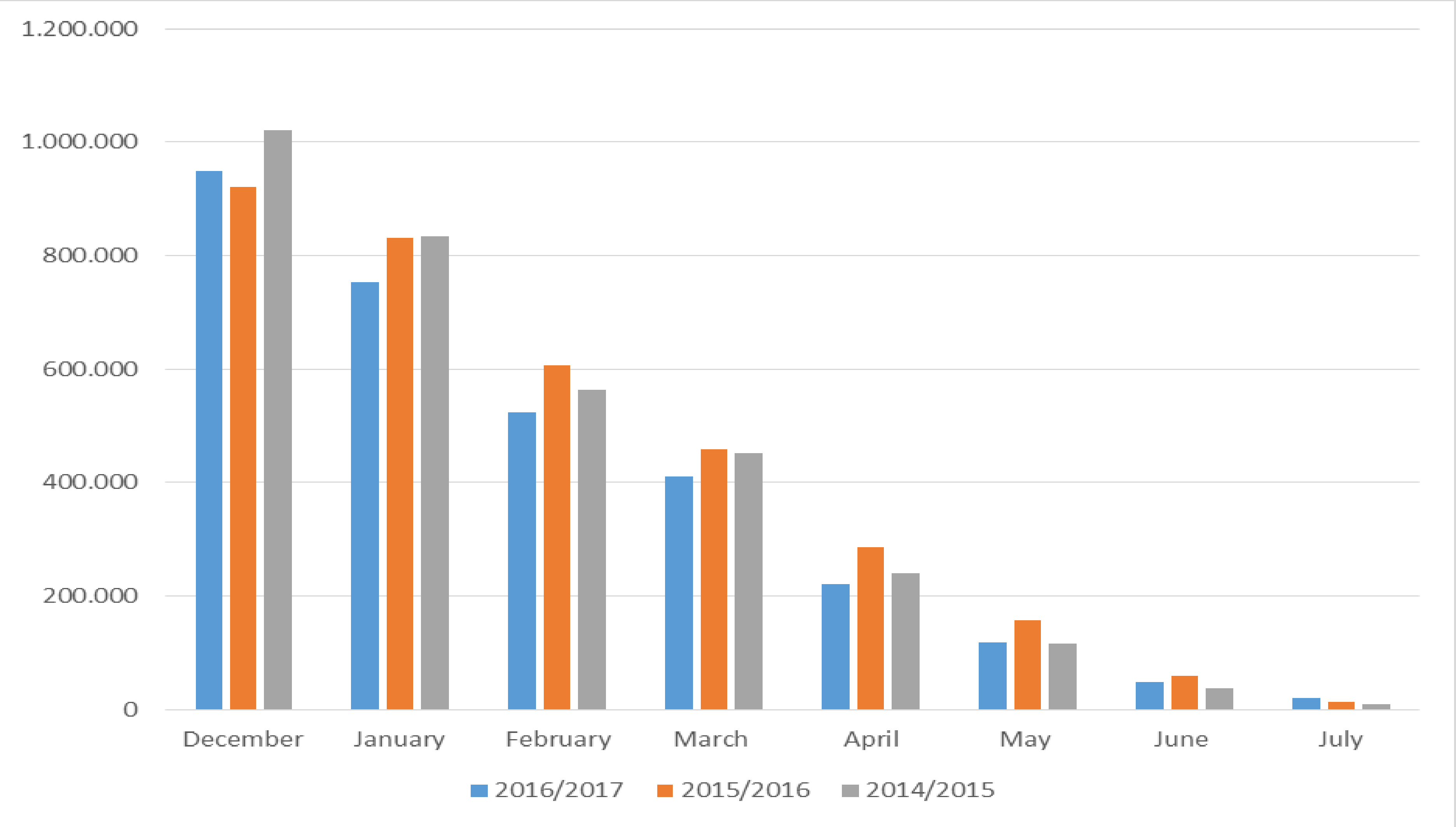
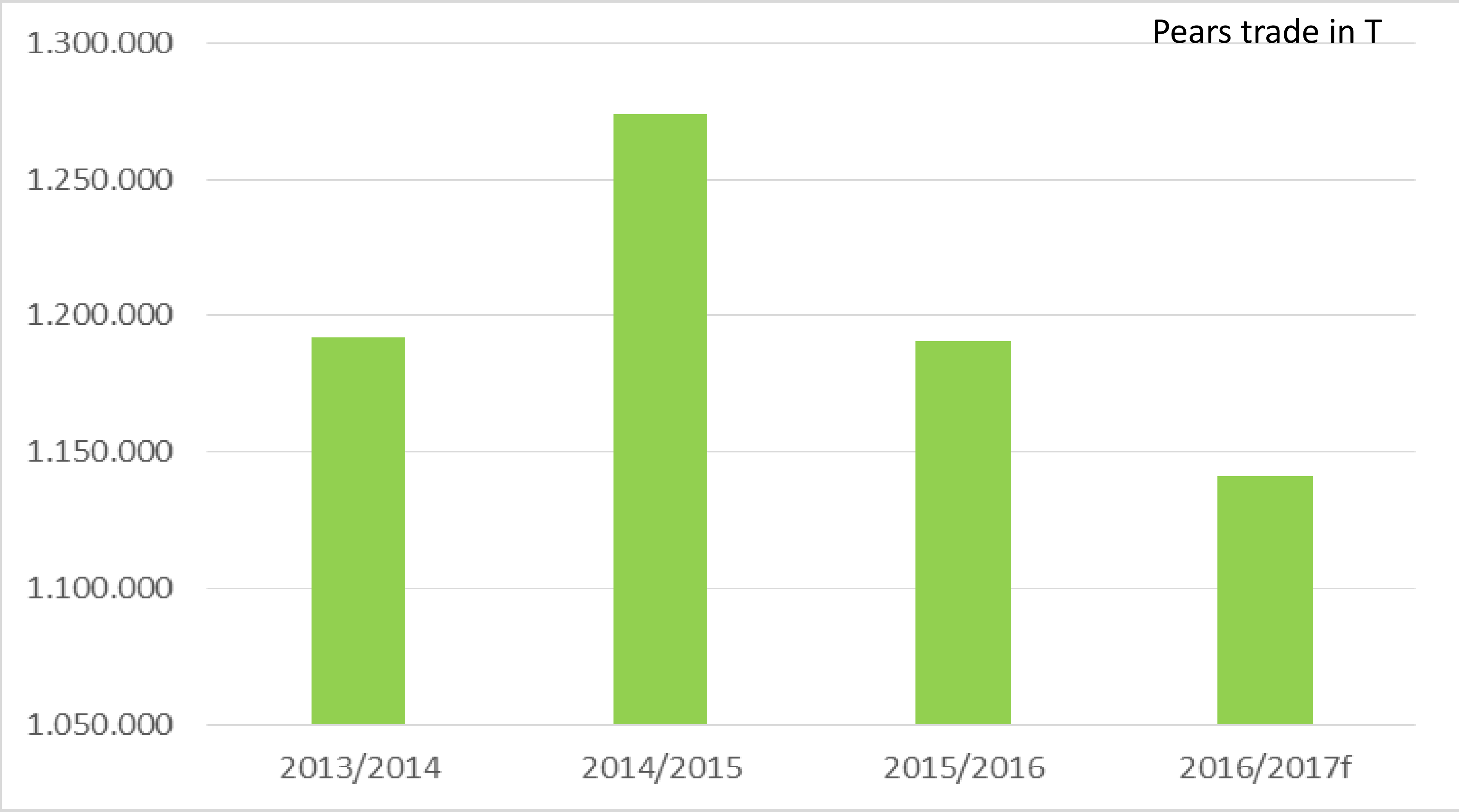


Russian embargo package 2016/2017

Products	Tons	%	€	%
apples	93 552	45.1	31 971 501	48.3
mandarins	16 366	7.9	3 637 350	5.5
peaches	14 626	7.0	6 004 502	9.1
carrots	13 421	6.5	3 008 300	4.5
pears	10 625	5.1	2 324 867	3.5
clementines	9 937	4.8	2 818 704	4.3
nectarines	9 556	4.6	3 243 915	4.9

Pears trade perspective (intra + export)



Pears trade perspective

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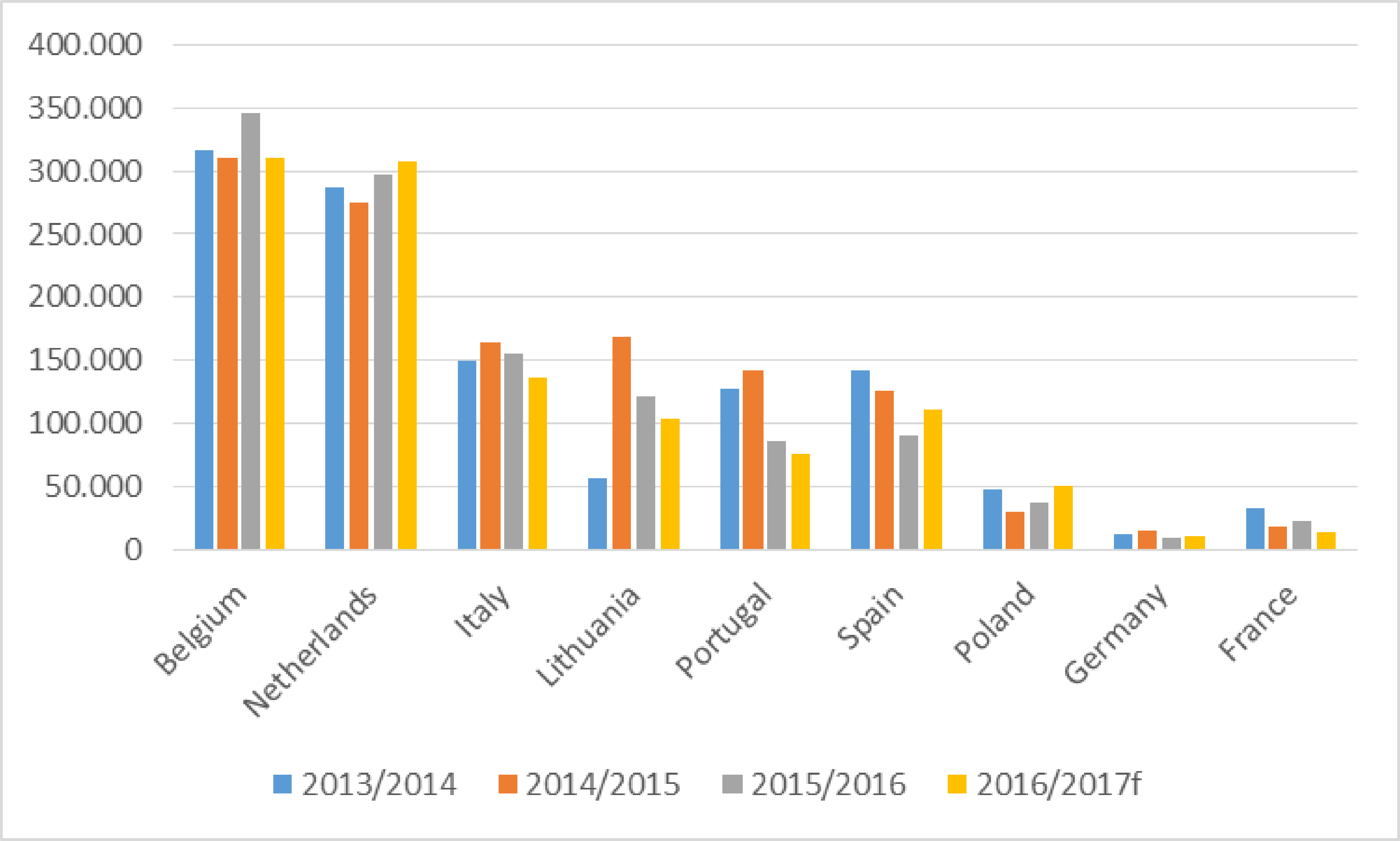

Pears trade perspective (export out of EU only)

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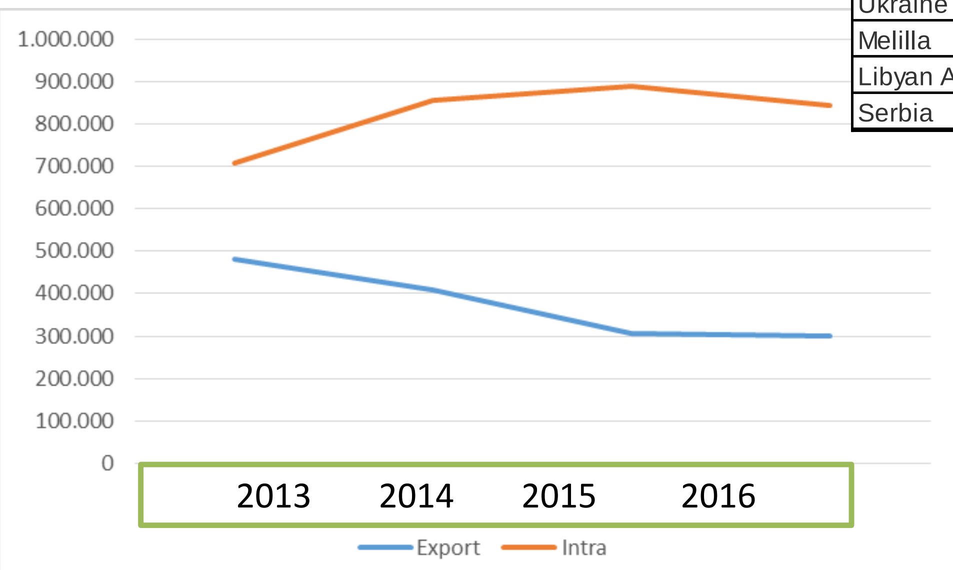
Third countries export destinations: trends 3 seasons:

- Belarus gateway
- Brazil under pressure
- Norway and Switzerland: safe bank
- China small progress

Partner	2016/2017f	2015/2016	2014/2015	2013/2014
Total	**301.324**	**304.953**	**410.004**	**481.480**
Belarus	145.079	146.703	185.150	55.818
Brazil	42.754	42.344	69.325	55.881
Morocco	20.337	15.367	19.779	14.848
Norway	17.054	17.459	18.064	16.653
Bosnia and Herzegovina	9.701	9.293	6.878	1.754
Kazakhstan	8.265	10.020	14.676	7.962
Switzerland	6.203	6.158	4.350	5.909
Israel	3.758	5.184	4.582	5.455
China	3.652	3.130	2.500	909
Hong Kong	3.801	4.429	5.637	3.037
Russian Federation	3.915	1.615	19.601	265.242
Ukraine	1.919	1.538	2.380	5.114
Melilla	2.630	2.723	2.955	3.377
Libyan Arab Jamahiriya	2.300	6.532	11.398	11.750
Serbia	4.495	2.190	2.403	770



Third countries export destinations v intra EU shipments: trends 3 seasons

Pears trade perspective

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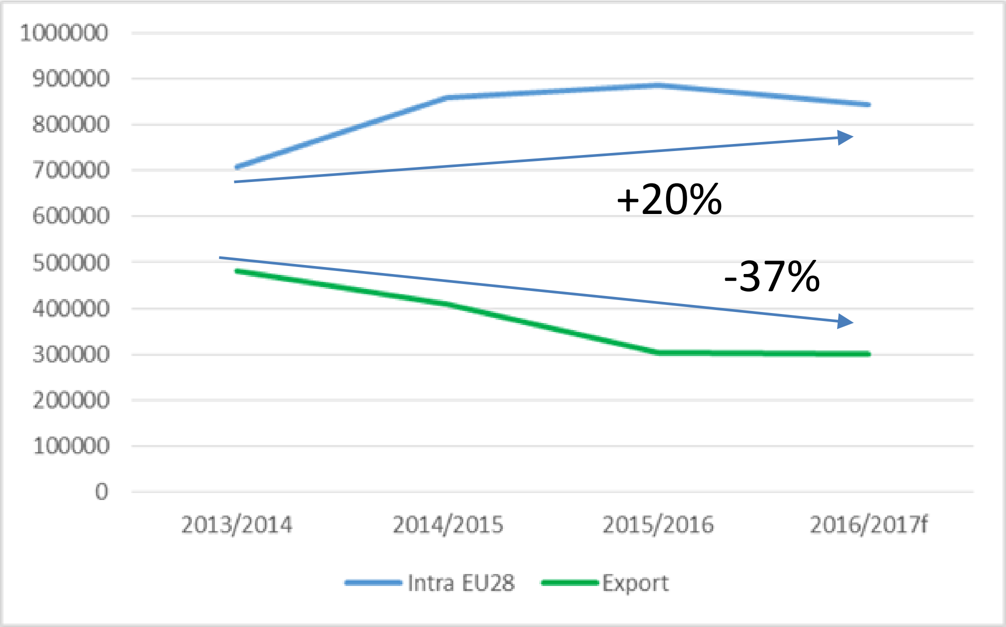
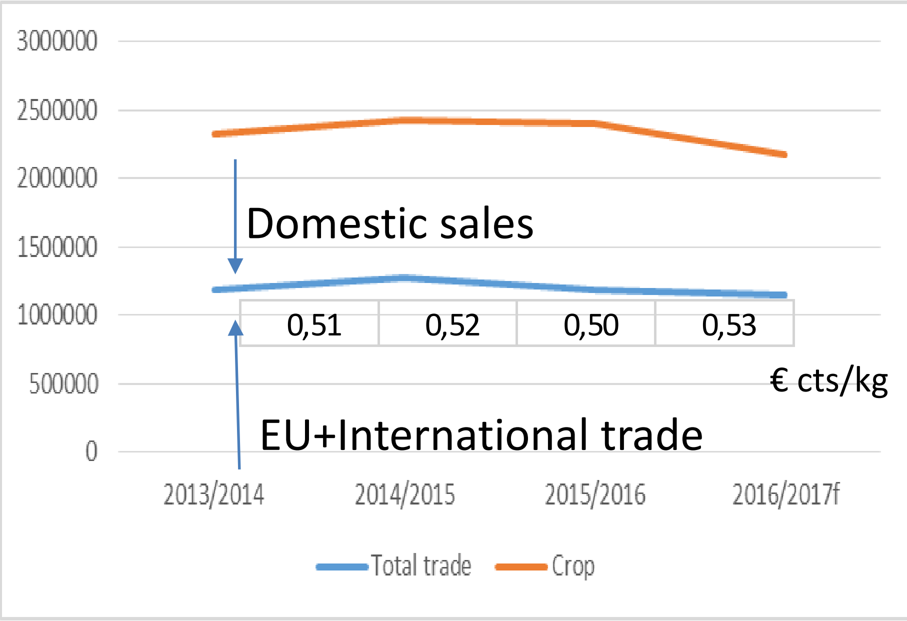
Trade trends pre and post embargo

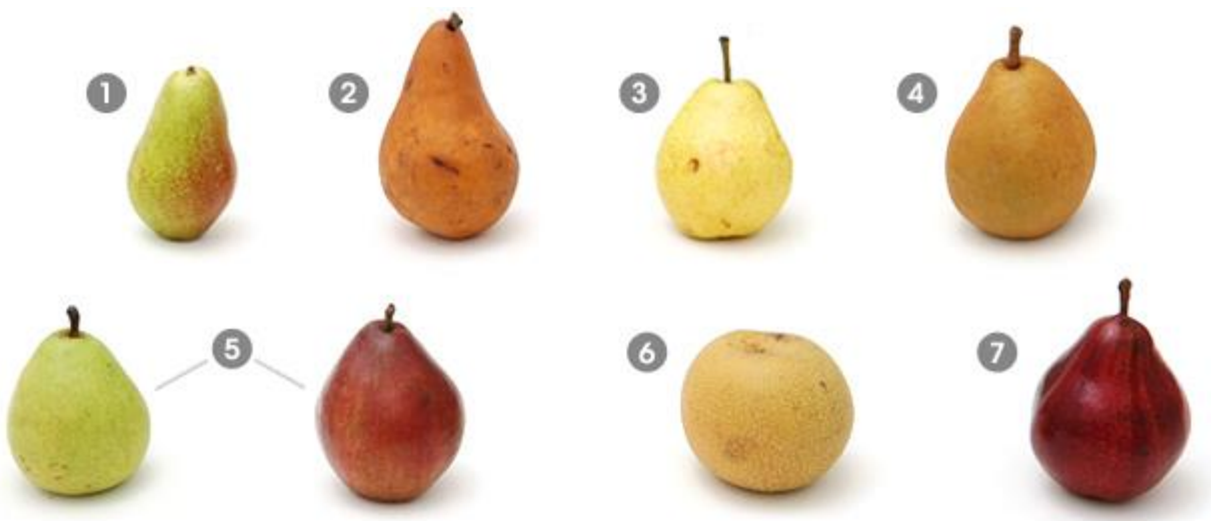
Trade in perpective of production

Pears trade perspective





Pear
orchard review



Pear total EU: Area (1000 HA)

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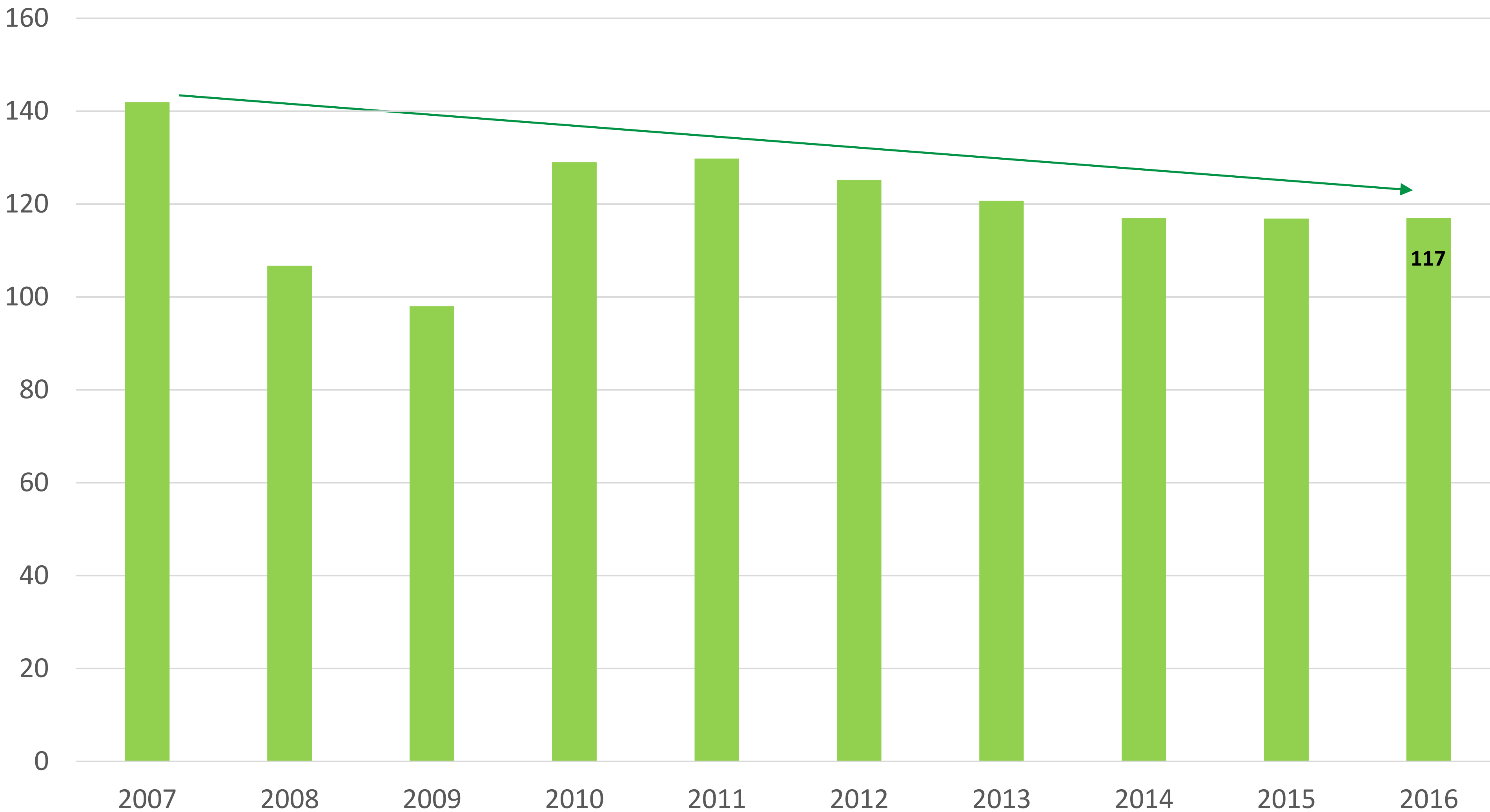

Pears key MS: Area (1000 HA)

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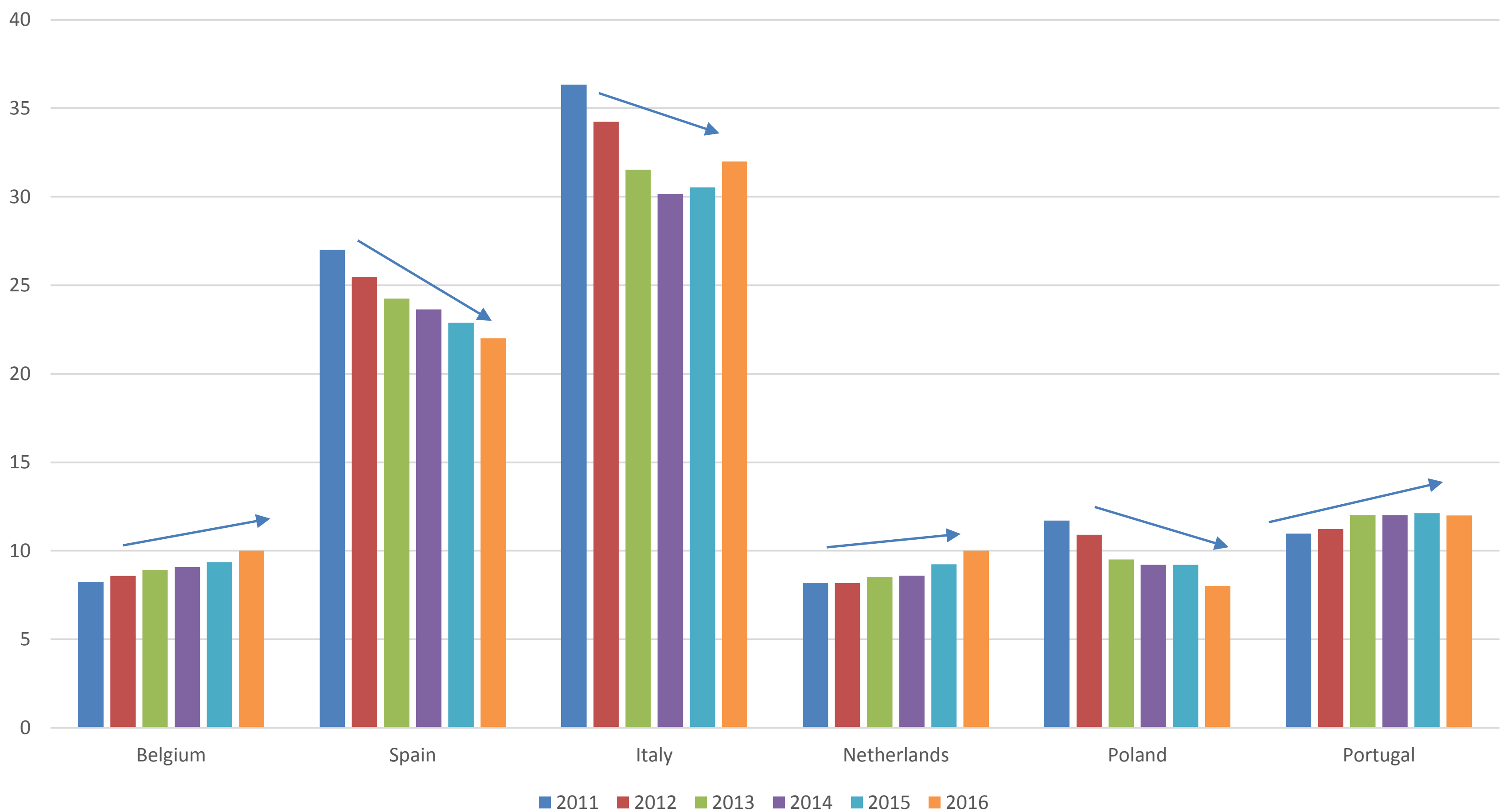
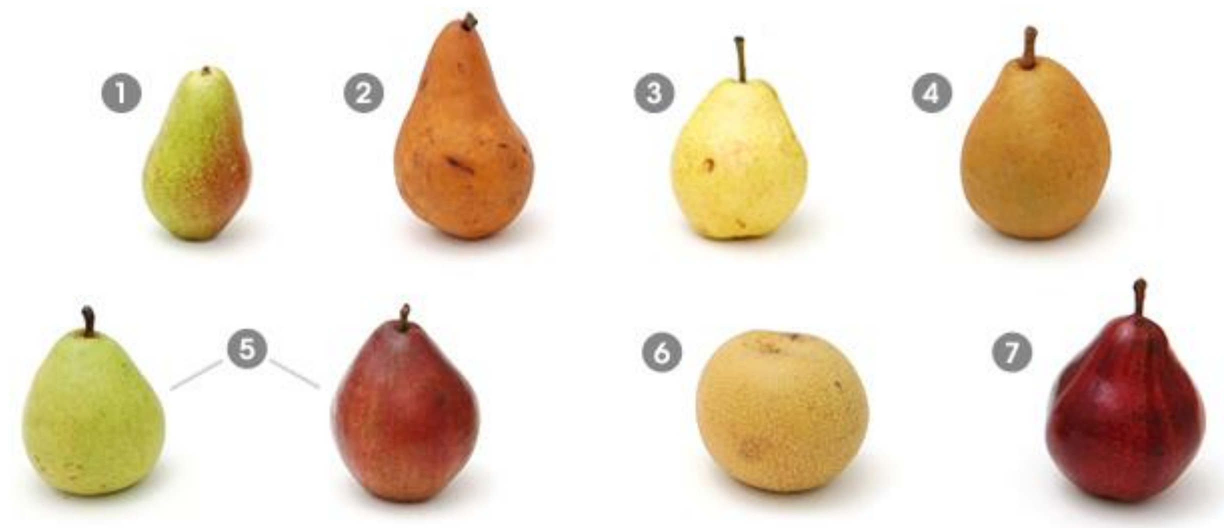
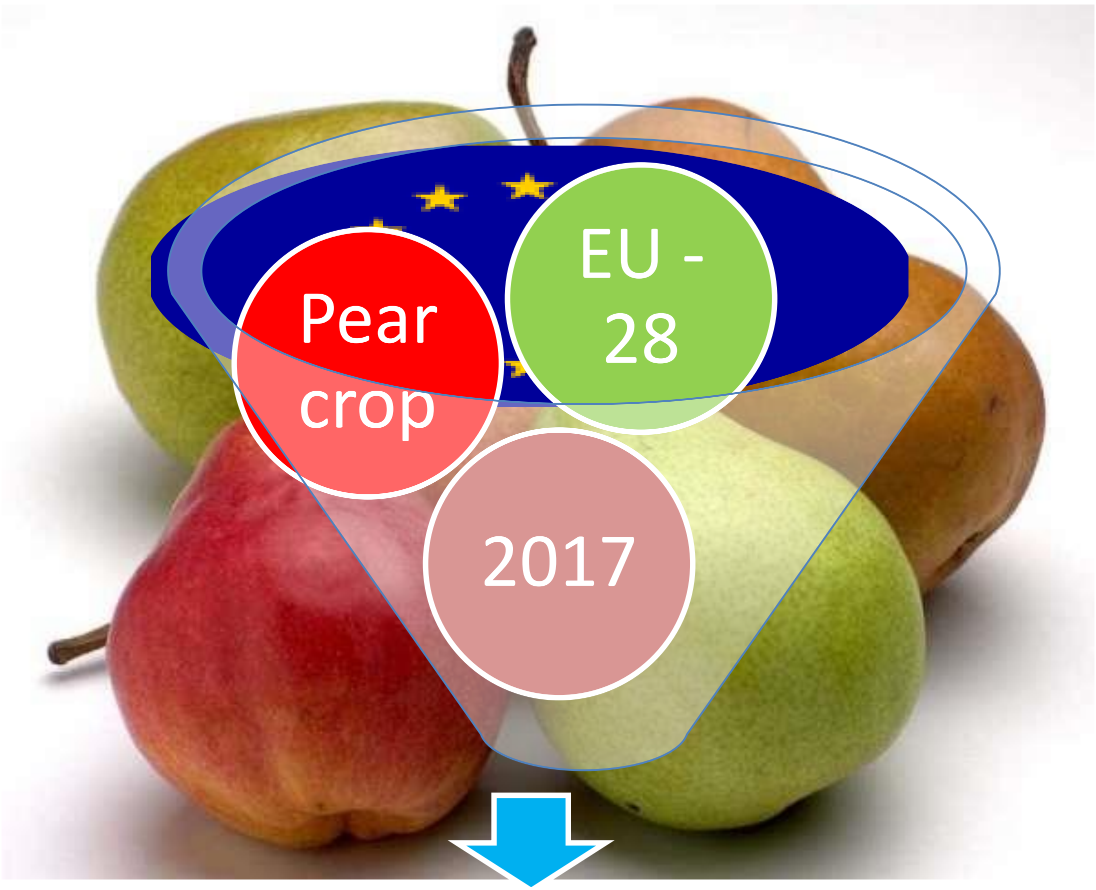


Pears forecast 2017
quantitative approach
EU 28 – by Member States



Forecast 2017



2.148.435 T

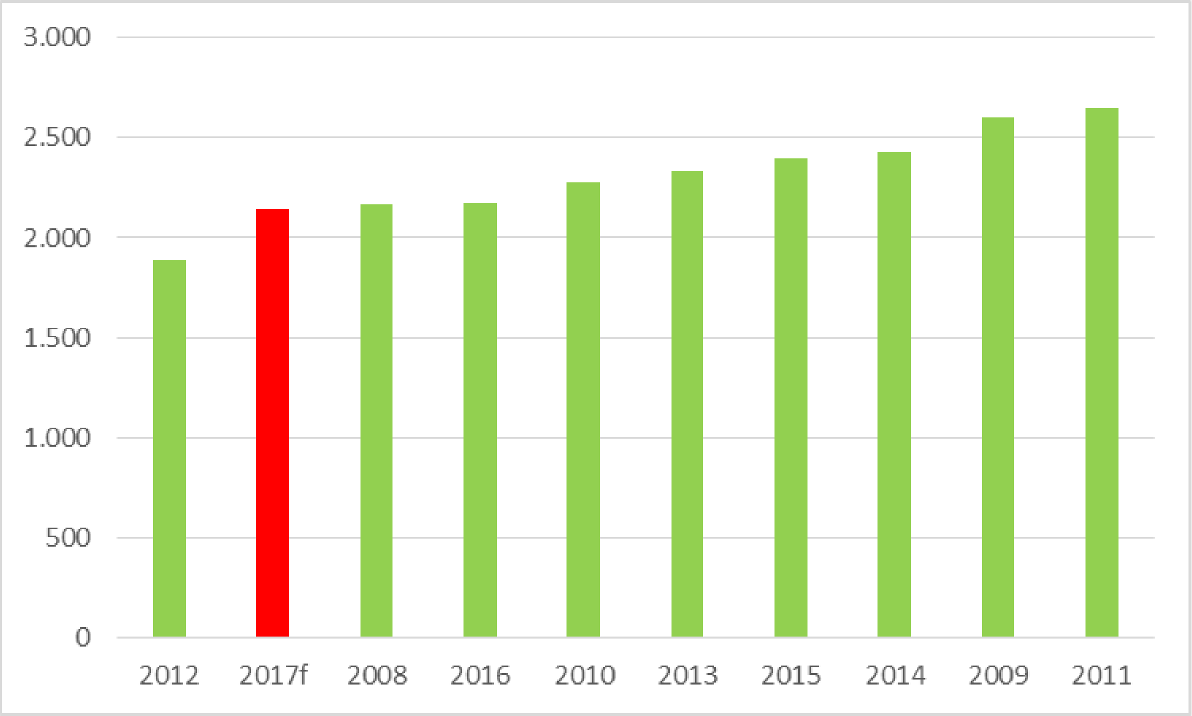
Forecast 2017

2.148.435 T

EU-28 crop in perspective

Ranking	Year	'000 T
1	2011	2.652
2	2009	2.603
3	2014	2.425
4	2015	2.394
5	2013	2.330
6	2010	2.276
7	2016	2.173
8	2008	2.168
9	2017f	2.148
10	2012	1.888

Y2017 in perpective		
2.345	AV10Y	-8%
2.337	AV5Y	-4%
2.383	AV3Y	-8%
2.173	2016	-1%



EU-28: share by MS

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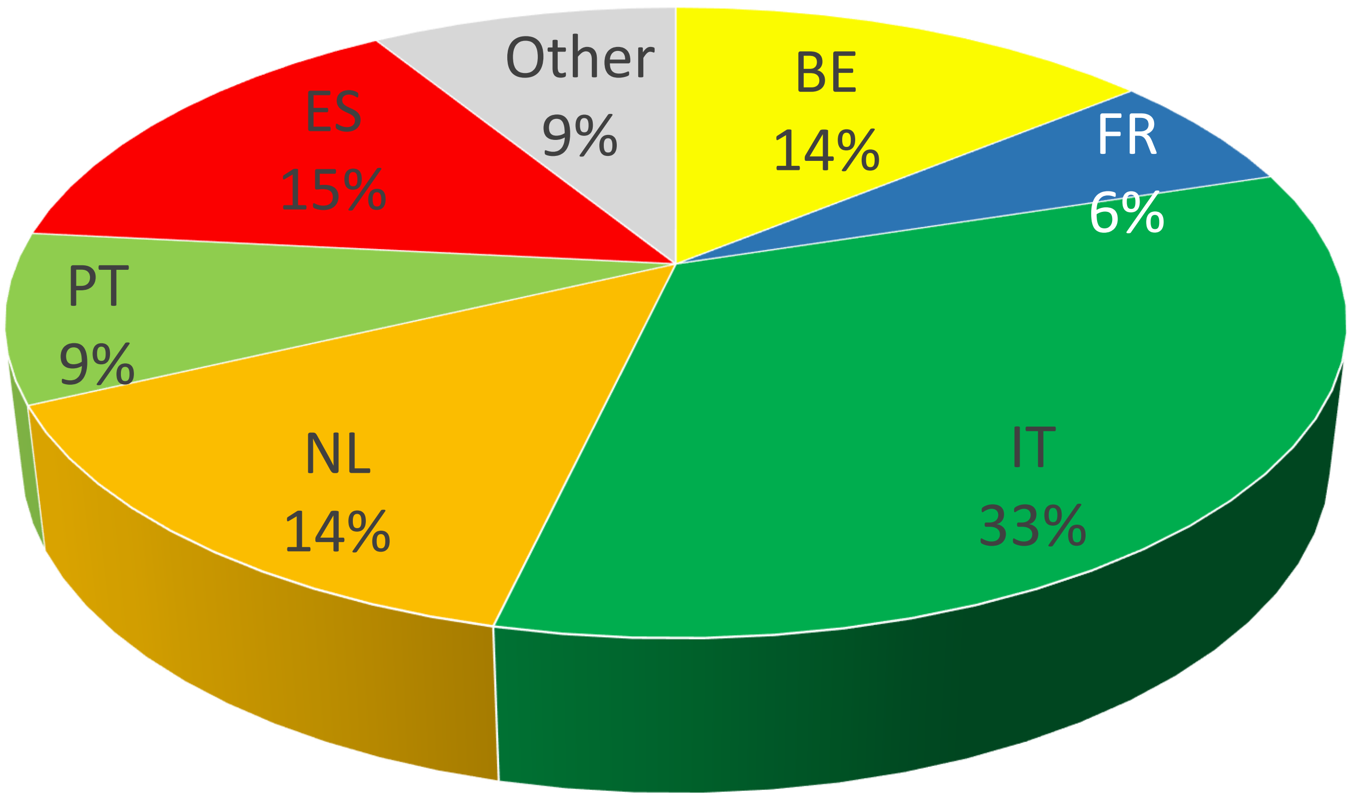

TOP 6 : IT- ES-BE-NL-PT-FR = 91 % of the EU production

Main producers trends

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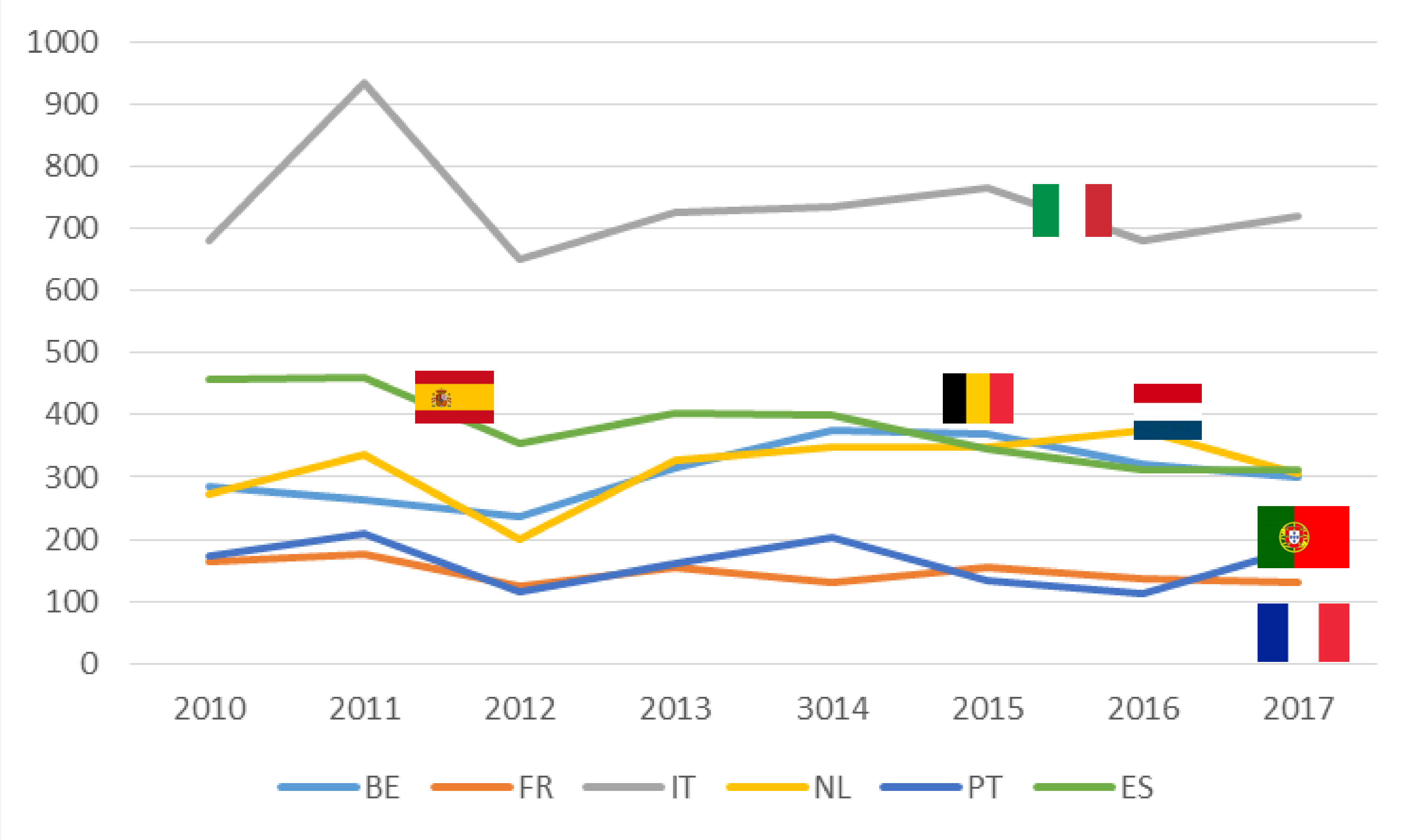
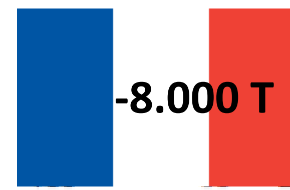
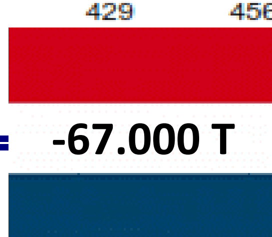


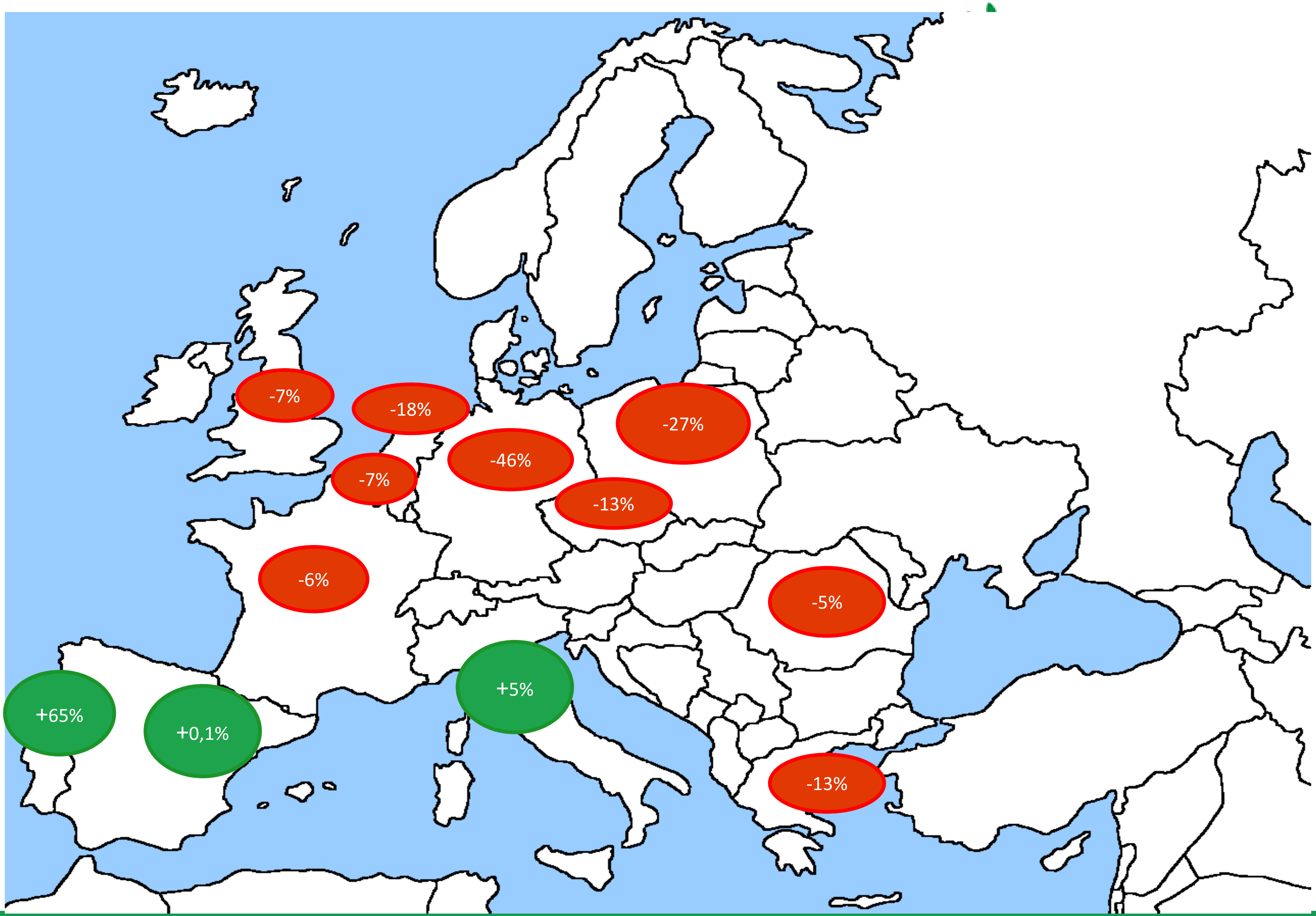
EU crop: 1% less than last year
4th consecutive year of decline

x 1000 tons

Country	2008			2011	2012	2013	2014	2015	2016	F2017	(1)	(2)
Belgium	170			295			374	369	322	301	-7	-15
Croatia	7			6			2	2	1	6	450	233
Czech Rep	3	6	3	3			4	10	7	6	-13	-15
Denmark	5	7	6	5			6	6			-17	-17
France				176	124	154	131	155			-6	-8
Germany				47	34	34	45	43			-46	-54
Greece				36	42	32	37	60			-13	-15
Hungary				21	25	36	40	33			-7	-5
Italy				934	650	726	736	764	681	719	5	-1
Latvia				0	0	0	1	0	0			
Netherland				336	199	327	349	349	374			
Poland				55	45	65	50	80	55			
Portugal	168	198	172	210	115	162						
Romania	53	24	20	28	19	24				16	-5	0
Slovakia	1	1	1							1	60	46
Slovenia	4	6	6							0	-57	-88
Spain	476	429	456				400	344	311	312	0	-11
Sweden	1						1	1	1	1	0	14
UK	23			32	28	26	25	25	27	25	-7	-3
Total:	2.168			2.652	1.888	2.327	2.426	2.394	2.173	2.148	-1	-8






-7%
-18%
-27%
-46%
-7%
-13%
-6%
-5%
+5%
+65%
+0,1%
-13%

2017 crop forecast – overview by MS

2.148.435 T (19 MS)

+ ca 27,000 T (remaining 5 MS – Eurostat data)

x 1000 tons

Country	2008	2009	2010	2011	2012	2013	2014	2015	2016
Austria	84,7	168,7	36,1	73,2	58,2	54,1	50,7	51,1	23,5
Bulgaria	0,9	1,4	1,4	2,0	1,4	2,9	2,2	3,0	2.0
Cyprus	1,2	1,3	1,3	1,2	1,1	1,1	0,8	0,7	0,8
Luxembourg	0,3	0,3	0.3	0,2	0,2	0,2	0,3	0,3	0,3
Finland	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,2	0,1

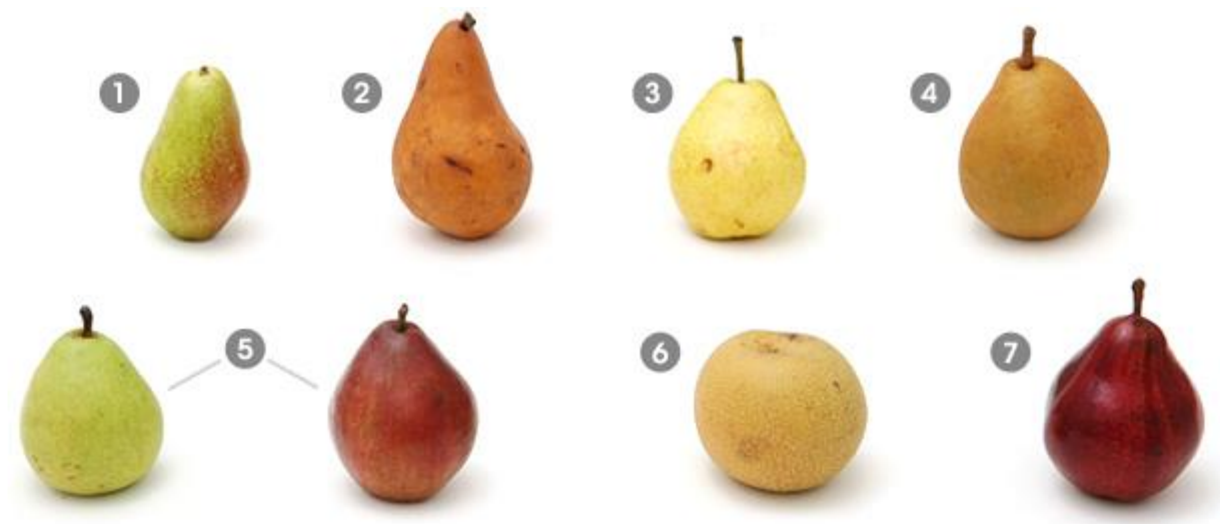
Est 2017
27,000 T

EU- 28 : 2.175.435 T

+ Switzerland : 15.700 T

Grand total : 2.191.135 T

Pear forecast 2017: quantitative approach EU 28 by varieties



EU 28 variety

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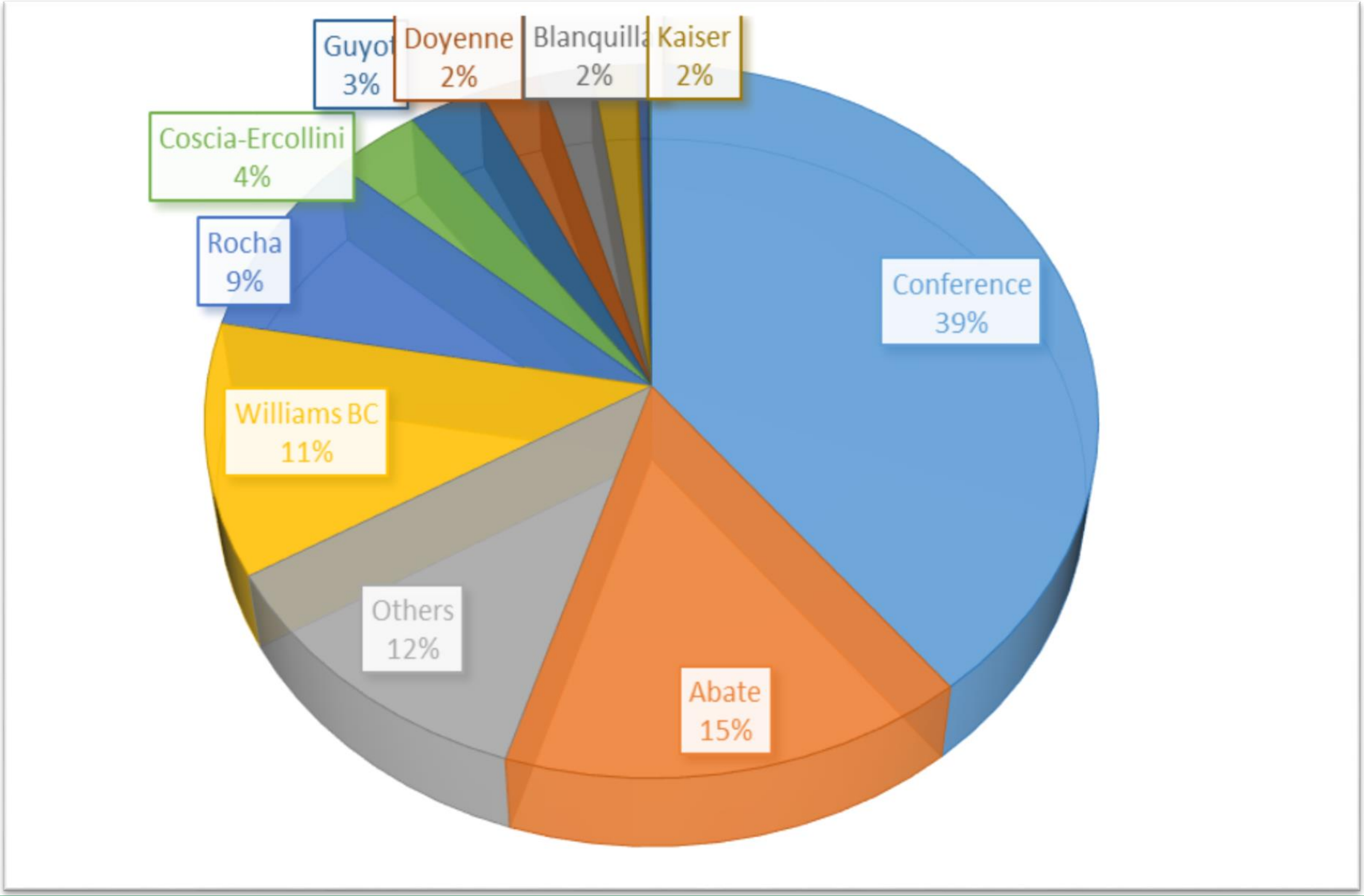
x 1000 tons

Variety	2008	2009	2010	2011	2012	2013	2014	2015	2016	F2017	(1)	(2)
Abate F 2	249	306	224	404	256	304	358	333	296	332	12	1
Blanquilla	82	86	81	78	59	54	49	44	40	45	11	1
Conference 1	639	903	832	928	693	894	952	967	910	844	-7	-11
Coscia-Ercollini	107	106	98	80	77	80	66	79	67	76	12	7
Doyenne du Comice	82	116	97	107	58	83	94	87	81	52	-36	-40
Durondeau	6	8	6	7	5	6	6	5	3	3	1	-32
Guyot	98	102	92	96	70	80	67	74	59	64	9	-4
Kaiser	39	65	42	60	39	54	33	45	38	38	0	-2
Passacrassana	21	19	15	17	17	14	11	12	11	10	-12	-17
Rocha 5	168	197	171	209	115	162	203	134	113	186	65	24
William BC 4	309	312	286	332	252	283	278	283	261	247	-6	-10
Other 3	369	382	331	333	246	315	309	330	293	251	-14	-19
Total:	**2.168**	**2.603**	**2.276**	**2.652**	**1.888**	**2.327**	**2.426**	**2.394**	**2.173**	**2.148**	**-1**	**-8**

2017 crop forecast – overview by varieties



2017 crop forecast –varieties overview

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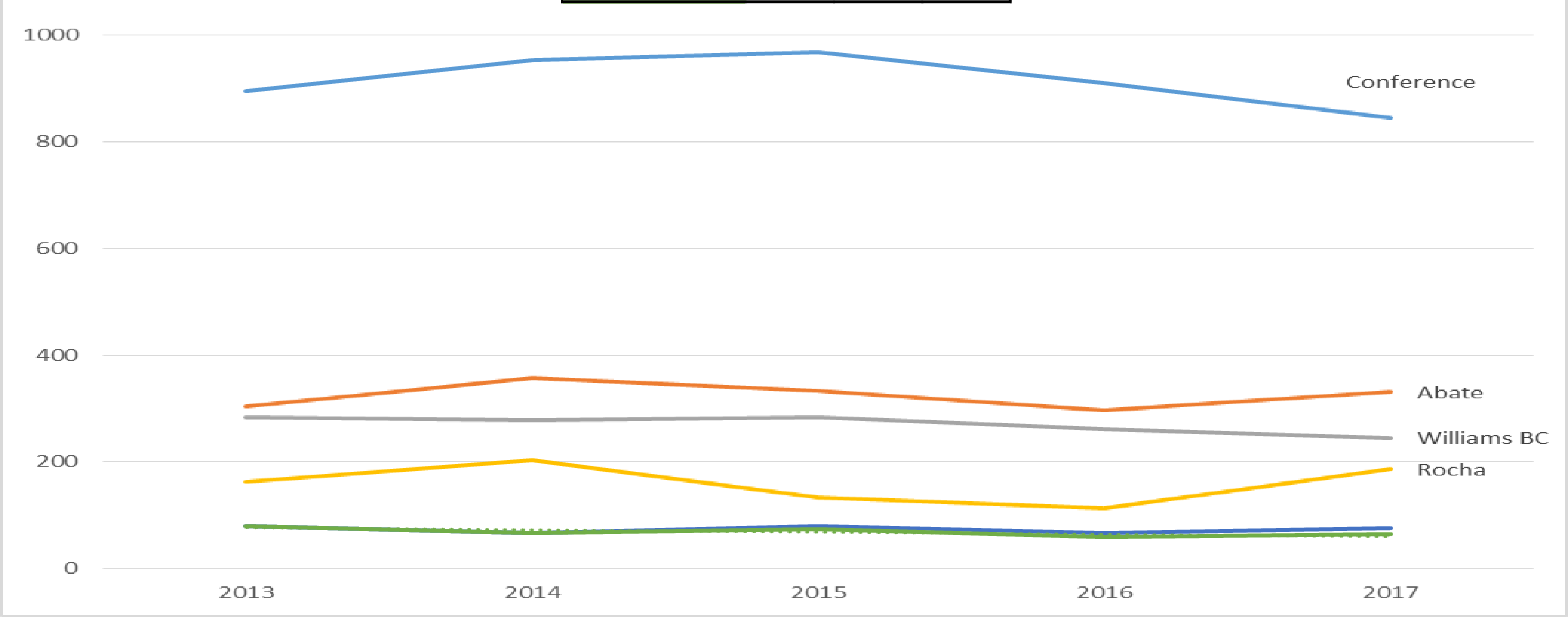
Consolidation :
Abate , conference, Willimam, Rocha,....

Varieties	2015	2016	2017
Conference	967	910	844
Abate	333	296	331
Others	330	293	250
Williams BC	283	261	245
Rocha	134	113	186
Coscia-Ercollini	79	67	76
Guyot	74	59	64
Doyenne du Comice	87	81	52
Blanquilla	44	40	45
Kaiser	45	38	38
Passacrassana	12	11	10
Durondeau	6	3	3

Decline :
Blanquilla, Guyo, Kaiser,Passecrassana



Varieties yearly variation 2016/2017

PEAR forecast 2017
Qualitative and country review

Italy 2017

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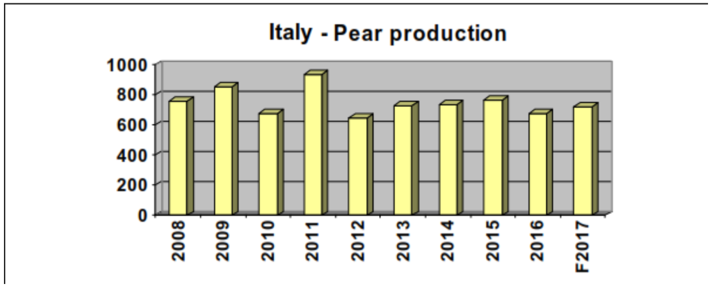
- 719.000T => + 5% Recovery from last year low for all varieties except for William BC and Conference
- Frost was more relevant in Veneto- T° over average towards summer and some hail in Emilia Romagna
- 20% due for processing and organic production is estimated at 3%
- Overall, blossoming leading to condition for abundant outlook while normal conditions for fruitsetting
- High temperature during spring but cold after Easter with frost (affecting mainly Veneto . Heath wave then in June –July with some hails in Emilia Romagna. Drought affecting North Italy
- Normal sizing and picking with a few days in advance compared to average.



Belgium 2017

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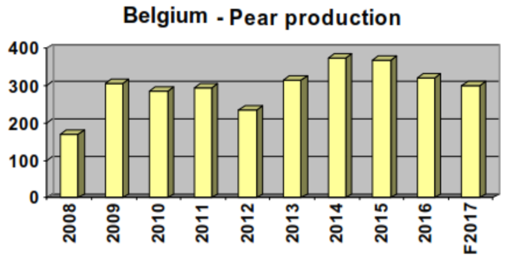
- BE crop at 300,000 T (-with 5% (15,000 T) to processing (2,000 T more than last year) , Organic production =1%
- Orchard HA now in 2017 over 10,000 HA
- Conference slightly below 300.000 T at 285,000 T. Conditions at blossoming and fruit setting were normal and scarce physiological drop
- Cold weather during and after blossom and low humidity affected fruit set for Doyenne and Sweet Sensation
- Frosts was severe but limited impact. Protection of orchards with overhead sprinkling
- Weather in general very dry
- Bad weather and droughts will least to average size 5 mm lower than average
- Crop around 14 days than average , 7-10 days compared to last year



The Netherlands 2017

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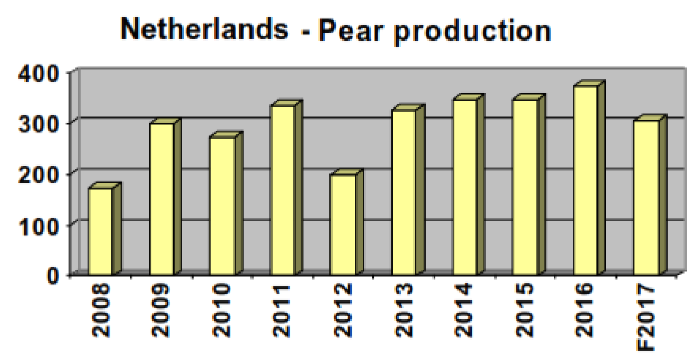
The Netherlands

- Crop down by 18% to last year peak crop => frost after flowering –dry period as well
- 3% crop is destined to processing
- 4% is organic
- Season few days earlier : start picking conference on 4 September
- Conference crop just below 290.000 T (-13%).
- Sweet Sensation: Impact of frost :

Total potential: 6100 T (2016); 4300 T (2017); 12,000 T (2020)

- Good growing conditions, good size and normal colouring. Organic around 3%.



Spain and Portugal 2017

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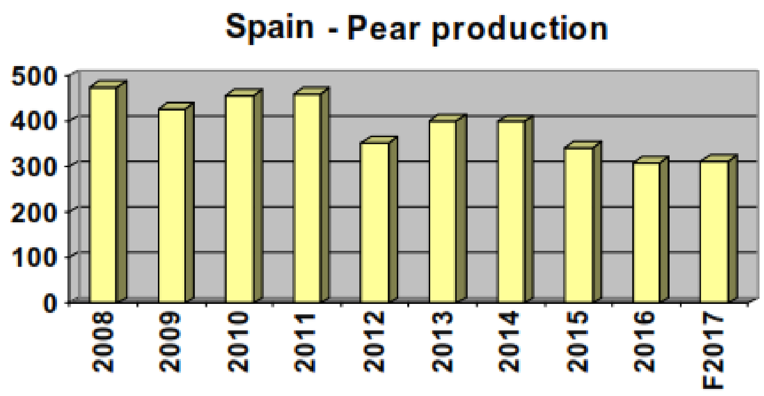
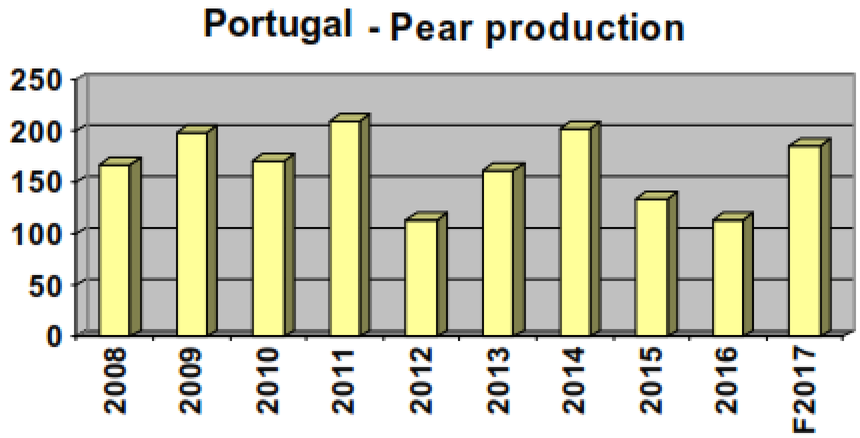
Spain

- Still on the low side, stable to last year at ca 310.000 T and -25% to 10Y average. Orchard still dominated by Conference (ca 45% of crop)
- Main production regions include Catalonia (140.000 T), La Rioja (53.000T), Aragon (50.000 T) and Murcia (30.000 T)

Portugal

- After two years of low crop recovery to the Rocha pear potential (+65 % at 186,000 T)





France 2017

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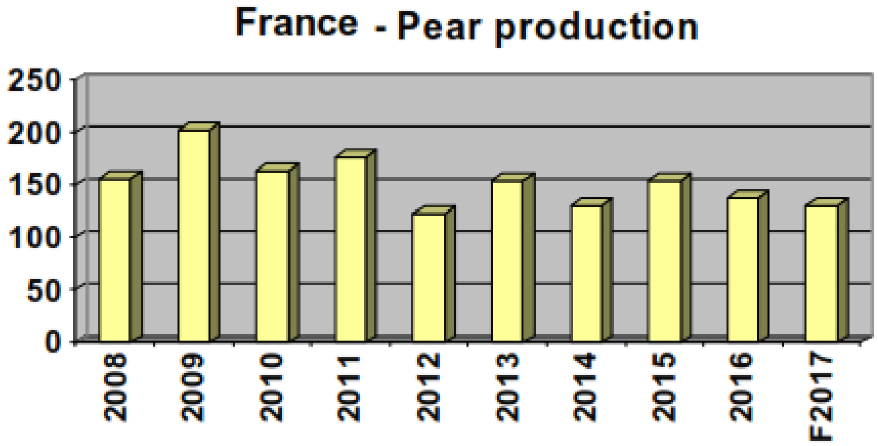
- Heterogenity of cold spell. Estimate not easy
- Crop 6% smaller than last year at 130,000T with Guyot and William representing respectively 35.000 T and 38.000 T
- Guyot and Angelys are up, while all other varieties are down
- Picking 1 week to 10 days earlier



Closing remarks

Closing remarks and parameters for the season

- ✓ Similar outlook to last year in volume
- ✓ Rebalance of volume from the North to the South
  - ✓ => main suppliers from the “North” (NL, BE, DE, FR) ca 100.000 T less
  - ✓ =>main “Southern “ suppliers (ES, PT, IT) 100.000 T more
- ✓ On-going repositioning after the Russia embargo
- ✓ Still improvement of prices needed

More analysis of the market by Helwig Schwartau

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Thank you for your attention

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